

Scheduling and time management in orthodontic offices



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Scheduling and time management in orthodontic offices is a crucial part of practice management. This article has delved into the various aspects of scheduling and time management and suggested certain protocols for smooth functioning of our offices. The authors believe that this would provide long-term productivity and sustainability to our practices. (Semin Orthod 2016; 22:275–279.) © 2016 Elsevier Inc. All rights reserved.

“I am definitely going to take a course on time management just as soon as I can work it into my schedule”—Louis E. Boone

Excellent clinical results, efficacy of treatment procedures and satisfaction of patients as well as the treating doctor are the primary goals of any clinical practice. As professionals, doctors also need to consider any practice as a business. Needless to say, the most important asset of any business would be the doctor himself. The doctor has various assets such as his knowledge, training, clinical skills, clinical acumen, and soft skills to make a practice successful as a business model. One needs to understand that above all the most important asset the doctor many times ignores or falls short off is his/her time. The time the doctor spends in more productive work will naturally transpire into more success clinically as well as financially. There can be no doubt that the success of any dental practice depends on how well the scheduling of appointments for patients is managed on a day-to-day basis. It also depends

on how well the office can maximize the doctor and associate's times so that he/she/they can deliver better dental care to his/her/their patients. It is but natural that working of different dental offices will depend mainly on the demographics as well as individual likes and dislikes.

A structured schedule and time management protocol is a necessity for all offices irrespective of their location and individual variations in thought processes. The goal of any practice should focus on being maximally effective and productive by increasing work efficiency. This article is an attempt to set forth some basic guidelines for smooth functioning of an orthodontic office and maximizing the utilization of the time available to the orthodontist and his staff in delivering the best possible orthodontic care on a daily basis.

At the outset one should always ask oneself how he or she perceives their practice. What type of practice do they envisage in the short as well as the long term. Practices across the world vary due to the demographics involved as well as the socioeconomic issues facing their respective countries. It is impossible to compare practices in the developed and developing countries. Personnel issues, economic issues, availability issues, mind-set issues, hiring issues, fee structures, etc., vastly differ from country to country and even city-to-city in the developing countries. It would be a futile exercise by the authors', to even try to make an attempt to compare a practice in a country in Asia to say in Europe or the United States. But whatever the type of practice in any country, scheduling and time management in our offices should not vary much. There will be variability in the number of hours a practice functions in a day according to the school and office timings of our patients. There will also be

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1073-8746/16/1801-\$30.00/0

<http://dx.doi.org/10.1053/j.sodo.2016.08.007>

variability in way of how many days the practice functions. In some practices it is a 5-day a week while in some it is a 6-day a week. Also many orthodontists have satellite offices. Naturally the scheduling will vary accordingly. Be that as it may, any practice to be successful requires giving priority to patient appointment scheduling and management of the doctor's as well as the patient's time.

The environment the practice functions should be stress free. None of the old as well as the new practice building/marketing tools is as effective as "appropriate management of your appointments." The office must always make sure that the patient does not have to wait and is welcomed into the operatory on his/her scheduled allotted time. The authors have found this to be a tremendous practice booster.

The appointment system should be such that the flow of patients is smooth with no overlap or overcrowding. Proper scheduling helps the office in delivering prompt service to their patients, accommodate emergencies, avoid non-productive time lapses and improve patient relations. It also allows one to mentally prepare for each day and to pace oneself throughout the day without getting fatigued.¹

In a newly setup practice, it is a good idea to prepare the schedule of working and timing of appointments according to the convenience of the patients. Once the practice is established, the office can take the liberty of gradually molding the mindset of its patients to cater to the convenience of the doctor/s and the office staff regarding the scheduling of the appointments.

Scheduling and time management encompass not only patient appointments but also determining the preparation time required for each procedure as well as the time taken for the procedure and the post-procedure time. It is a good idea to use a stopwatch to measure the actual time taken for a procedure. This can be done for all time-consuming procedures. The working hours of each day could then be divided into 15-min slots. The preparation time required for sanitization and disinfection of the operatories and sterilization of the instruments can also be added to the procedure time. Extra sets of instruments that can be sterilized and kept ready at the beginning of the day, and well-trained chair-side assistants who can prepare the

operatory for the next patient are good investments in reducing the preparation time. Post-procedure time that may include giving instructions about various aspects of treatment, hygiene, medications, etc., also needs to be considered. It is a good idea to have dedicated space for post-procedure instructions. This will save valuable chair-side time.

A list of these procedures and timings could be kept at the front office desk. This will help the office front office personnel (receptionist) to arrange the daily schedule appropriately. It is always beneficial if this job is delegated to a well-trained receptionist or treatment coordinator.¹

Objectives of a daily appointment schedule are as follows:

1. Respecting the patient's and their parent's time.
2. Streamlining the patient flow in the office.
3. Increasing productivity in the office by avoiding unnecessary loss of time.
4. Setting aside most effective hours of the day for more intricate and time-consuming procedures, for example, microscrew placements, bonding procedures, etc.
5. Giving an opportunity to prioritize workload.
6. Keeping dedicated appointment slots for emergencies and/or impromptu consultations.
7. Properly sequencing follow-up appointments.
8. Streamlining of cancellations.

It is always advisable to allocate the strenuous work appointments in the earlier half of the day, as the doctors and staff are fresh. Consultations, record preparations, and check-ups could/should be scheduled in the latter half of the day. This ensures that the doctors and staff give their best clinical output for effective and quality care to their patients.

Maintaining an appointment schedule is primarily the responsibility of the front office personnel, but the doctor should also be actively involved in this process. The front office personnel should be efficient enough to coordinate with the doctor concerned while preparing the doctors' daily schedule. In the yester years maintaining an appointment book was the norm. In today's highly techno savvy world, there is an abundance of practice management software, which also includes appointment scheduling as

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